



P021, Fundraising Policy: Phase 5

To: Governance and Policy Committee

Date: 20 March, 2024

Report No.: 03-24-4670

Strategic Directions

- Provide Equity of Access to Learning Opportunities for All Students
- Allocate Human and Financial Resources Strategically to Support Student Needs
- Build Strong Relationships and Partnerships Within School Communities to Support Student Learning and Well-Being

Recommendation

It is recommended that the revised Fundraising Policy (P021), as presented in this report, be approved.

Context

The Fundraising Policy (P021) (the “Policy”) was adopted by the Board of Trustees on March 28, 2001, and last reviewed on June 26, 2003. On May 3, 2023, staff provided preliminary provisions at the Governance and Policy Committee before proceeding with public consultation.

A pre-consultation survey was conducted with the Parent Involvement Advisory Committee (PIAC) in Spring 2023 for one month to obtain initial feedback. An extended term of public consultations was initiated on May 29, 2023 and concluded on October 20, 2023. As part of the public consultations, the Policy was posted on the TDSB website and shared with various stakeholder groups (i.e., Community Advisory Committees, School Councils, Student Senate, professional associations/unions) for input and comments.

Revisions to the Policy (see Appendix A) include:

- Updated definitions;
- Commitment to equity through a proposed System Priorities Fund (formerly the Central Equity Fund);
- Alignment with Ministry guidelines; and

- Provisions regarding online donations.

Board staff also administered a survey to seek detailed feedback.

Survey Results:

323 respondents representing parents/guardians/caregivers, School Council members, employees, Statutory and Community Advisory Committees, trustees and students completed the online survey and 11 e-mails containing feedback were submitted. A number of anonymous respondents provided feedback as well.

Key themes:

Regarding the implementation of a System Priorities Fund:

- 54% agree or strongly agree with the implementation of a System Priorities Fund
- 30% disagree or strongly disagree with the implementation of a System Priorities Fund
- 16% no opinion regarding the implementation of a System Priorities Fund

Regarding whether surplus funds sharing should be voluntary or mandatory:

- 60% - Voluntary
- 30% - Mandatory
- 10% - No opinion

Respondents provided additional feedback in the following areas:

1. Fundraising activities involving the sale and/or consumption of alcohol, drugs or tobacco;
2. Fundraising and Fun Fair Vendor Program fees;
3. Tax receipts for “Gifts of Services” or “Services In-Kind”;
4. System Priorities Fund allocations - transparency and accountability;
5. School Council banking procedures;
6. Volunteer compliance - waivers, police record checks; and
7. Guidelines for school events held outside TDSB property.

In addition to the survey, Board staff held a focus group for PIAC’s Consultation Working Group on October 12, 2023, and the feedback received at that meeting is reflected in the revised draft Policy and will also be used for the review of the associated operational procedures.

The revised draft Fundraising Policy was reviewed and approved by Executive Council on February 27, 2024.

The revised Policy (see Appendix B) is presented for Committee’s consideration and approval.

Action Plan and Associated Timeline

Subject to the Governance and Policy Committee’s approval on March 20, 2024, the Policy will be presented to the Board of Trustees for consideration and final approval on April 17, 2024. Once approved by the Board, the newly revised Policy will come into

effect immediately. In addition, related operational procedures to support implementation of the Policy will be reviewed and/or developed as required.

Resource Implications

No additional resources will be required for implementation of the revised Policy at this time.

Communications Considerations

Following Board approval, the Policy will be communicated in accordance with the Policy Review Work Plan.

Board Policy and Procedure Reference(s)

- Advertising & Distribution of Materials Policy (P006)
- Board Member Code of Conduct Policy (P075)
- Employee Conflict of Interest Policy (P057)
- Fundraising Procedure (PR508)
- International Disaster Relief Procedure (PR609)
- Mission, Values and Goals Policy (P002)
- Purchasing (P017)
- Restrictions on Alcohol, Drug and Tobacco Use (P095)

Appendices

- Appendix A: P021 Fundraising Policy - Tracked Changes
- Appendix B: P021 Fundraising Policy – Clean

From

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Garry Green, Senior Manager, Community, Business and Student Transportation Services, by email at Garry.Green@tdsb.on.ca

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Toronto District School Board

Policy P021

Title: **FUNDRAISING**

Adopted: March 28, 2001

Effectuated: March 28, 2001

Revised: October 24, 2001, June 12, 2002

_____ June 26, 2003 (Replaces E.011: Fundraising), [TBD]

Review: _____

Reviewed: October 24, 2001, June 12, 2002, June 26, 2003, [TBD]

Authorization: Board of Trustees

1. RATIONALE

The Fundraising Policy (the "Policy") supports the Toronto District School Board's (TDSB) commitment to fiscal responsibility and financial viability and promotes student achievement when planning and implementing fundraising activities. The Policy is aligned with the Education Act, Regulation 612/00 and the Ministry of Education's School Fundraising Guideline.

1.02. OBJECTIVE

- To outline expectations and provide guidelines/directions to direct schools/TDSB staff and members of school communities when planning and implementing fundraising activities.

2.03. DEFINITIONS

Crowdfunding is a fundraising method where a large number of people each give an amount of money to pay for an initiative or project, especially by using a website to collect the money.

Donation is a voluntary contribution to the Board or to a school in the form of a financial donation, gift in kind or gift of service. Donations can be designated (with a specific purpose attached) or non-designated.

External Organizations are groups that are not legally affiliated with the Board. They may fundraise for their own purposes, or for TDSB (schools, departments,

central initiatives). Examples of these groups are alumni associations, corporations or Home & School Associations.

Fundraising ~~is a local school or system-wide activity that to raise money or other resources and~~ is a collaborative effort among parents/guardians/caregivers, students, ~~school~~ staff and the school community to raise funds ~~to enhance the school program and in~~ support of:

- local school programs/initiatives;
- central campaigns;
- external initiatives/charities to benefit TDSB schools/students; or
- external initiatives/charities supported by TDSB to benefit external organizations/causes.

Fundraising Activities may include, but are not limited to:

- Donations (in-kind or monetary)
- Fun Fair events
- Scholarship/Contest/Bursary
- Internet-mediated registries (Board approved crowdfunding sites)
- Product sales
- Games of Chance (i.e., 50/50 Draw, Bingo, Lotteries and Raffles)
- Sponsorship opportunities
- Voluntary contributions from stakeholders

School Community refers to students, parents/guardians/caregivers, staff, school/student councils, Trustees, and members of the broader community, partners and others, who support the local school and student achievement.

School-Funded Project is work that the school has identified as a priority and has funds to pay for in whole, either through the principal's school budget or through fundraising (including grants), such as a playground or school yard enhancement. School-funded projects do not include routine maintenance, emergency repairs or major capital improvements such as roofing or boilers. A school-funded project should not result in a significant increase in school or TDSB operating or capital costs (e.g., air conditioners).

School Generated Funds are funds that are raised or generated from sources other than the Board's operating and capital budget including funds raised by School Councils. These funds are administered by the school principal.

Sponsorship is an agreement between the Board and an association or company by which the sponsor provides financial or resource support for which they may receive recognition and/or advertisement.

System Priorities Fund means a central fund established by the Board for the purpose of managing undesignated donations or donations designated for the fund. This fund assists in addressing system needs across all schools and/or

helps distribute resources based on equitable principles.

4. RESPONSIBILITY

Associate Director, Modernization and Strategic Resource Alignment

5. APPLICATION AND SCOPE

This Policy applies to all employees, members of school councils and community members involved in planning, implementing and supervising fundraising activities may include sponsorships and managing donations to the Board.

3.06. POLICY

6.1. Accountability of Funds

6.1.1. The school principal is ultimately responsible for all fundraising activities conducted in the name of the school, including school council activities. The principal will have financial oversight of all school generated funds. Where a separate school council bank account exists, the signing officers of the bank account must include the principal and a member of the school council, and all disbursements must be pre-approved by the school principal.

6.1.2. Central staff will have financial oversight of all system-wide fundraising activities and donations.

6.2. System Priorities Fund

~~3.1.6.2.1.~~ To ensure facilitate improved equity, a central equity fund shall of resources among schools, a System Priorities Fund will be maintained that will hold fundsto redirect undesignated donations from external sources and/or for schools to voluntarily donated through a system-wide, curriculum-based fundraising criteria.direct surplus School Generated Funds.

6.2.2. Local charitable foundationsA process for the allocation of System Priorities Funds will be determined by the accompanying Fundraising Procedure (PR508).

6.3. Conflict of Interest

6.3.1. All employees, school community members, and Trustees must avoid situations which may result in an actual or apparent conflict of interest and comply with all applicable TDSB policies, including the Employee Conflict of Interest Policy (P057), the Board Member Code of Conduct (P075) and Purchasing Policy (P017).

6.4. Funds Management

- 6.4.1. Fundraising activities must be accountable and transparent, with school/student councils and their local school communities being informed about how fundraising proceeds are used by the school.
- 6.4.2. Funds must be raised for a designated purpose and used for that intended purpose. School generated funds will be used within a two-year period unless specified for a specific project or use.
- 6.4.3. The fundraising plan will be documented in a school generated funds plan and incorporate input from the School Council.
- 6.4.4. All financial activities regarding school generated funds must be tracked and reported to the Board for year-end financial reporting purposes. If the designated purpose is no longer applicable or if there are unused surplus funds remaining from historic fundraising activities, the funds can be redirected to other purposes by the school principal in consultation with the school community.

6.5. Promotional Materials for Fundraising Activities

- 6.5.1. All promotional materials related to fundraising and/or sponsorship activities require approval by the principal prior to distribution to the community and must comply with the Board's Advertising and Distribution of Materials Policy (P006), and other relevant policies and procedures (e.g., Human Rights (P031), Board Code of Conduct (PR585), Promoting Respect in the Workplace (PR739)).

6.6. Fundraising to Support External Organizations and/or Other Causes

- 6.6.1. Fundraising to support External Organizations and/or Other Causes will require approval of the school principal or central department lead. Where possible, contributions to an external organization or cause should be collected directly by the external organization. Upon receipt, responsibility for the funds will rest solely with the external organization.
- 6.6.2. The Board will not provide tax receipts for these funds; this will be the sole responsibility of the External Organization.
- 6.6.3. No External Organization will fundraise in the name of the school, operate as a school council of the school, or conduct fundraising or other activities in a school, or use the school's name, without the principal and the Board's consent and approval.
- 3.2.6.6.4. Any External Organization affiliated with schools shall will conform to Board policy and Ministry of Education policies and applicable legislation, including Ontario Regulation 612/00.
- 6.6.5. ParentCentral fundraising activities, including Board-initiated campaigns, including international disaster relief efforts will be managed by central staff and student participation in accordance with the International Disaster Relief Procedure (PR609).

6.7. Participation and Consent

- ~~3.3-6.7.1. Participation in fundraising activities is strictly voluntary. No individual should feel compelled to participate in any fundraising activity shall be voluntary supporting internal or external initiatives, nor should they be subject to penalties, or denied any benefits, if they choose not to participate.~~
- ~~3.4. Door-to-door canvassing by junior elementary school students shall not be permitted without written parental/guardian consent and when accompanied.~~
- ~~3.5. No products to be sold for fundraising purposes shall be sent home with students without written parental consent.~~

6.8. Safety Considerations

- ~~6.8.1. Safety of students is a primary consideration in all fundraising activities. Parents/Guardians/Caregivers must be informed of all fundraising activities before they are undertaken by students. Student fundraising activities require supervision and should be age appropriate.~~

6.9. Procurement Requirements surrounding Fundraising Activities

- ~~3.6-6.9.1. Schools must use Board approved Fundraising/Fun Fair Vendors to ensure the company is in good standing. Products used for school fundraising shall will be of good quality and provided by reputable companies as defined by the Board's purchasing guidelines, appropriate for student consumption or use; in keeping with the to reflect the school community's standard of propriety; and reflective of the Board's values Mission, Values and Goals Policy (P002). New fundraising vendors are added throughout the school year to a directory on the Board's website, granted they are in full compliance with the Board's policies and procedures.~~
- ~~3.7. Secondary school students shall be encouraged to work in a group of at least three students and during daylight hours when fundraising in the community.~~
- ~~3.8. Where incentives are warranted, class or group awards are acceptable.~~

6.10. Money raised through fundraising is Raffles and Lotteries

- ~~6.10.1. Schools planning to fundraise using a 'game of chance' (i.e., raffles, bingo, 50-50 draw, break open tickets) must apply for a Lottery License. All such activities are governed by the Gaming Control Act and all of its Regulations. A separate bank account must be opened, and the School Generated Funds bank account should not be used for games of chance.~~

6.11. Alcohol, Drug and Tobacco Restrictions

6.11.1. All fundraising activities must comply with the TDSB's Restrictions on Alcohol, Drug and Tobacco Use Policy (P095).

6.12. Donations, Grants and Sponsorships

6.12.1. Central Agreements are required for sponsorship and donations. Central Agreements may be required for grants, scholarships/contests/bursaries. The Fundraising Procedure (PR508) will outline the procedures related to Agreements. Donors and sponsors will be recognized in accordance with the Advertising and Distribution of Materials Policy (P006).

6.13. School Council Fundraising

6.13.1. All school council fundraising activities and expenditures must be conducted in accordance with Board policies, Ministry directives and applicable legislation. School Council activities must also align with the annual School Generated Funds Plan, as approved by the school principal.

6.14. Online Fundraising and Crowdfunding

6.14.1. Fundraising may be conducted online, using only the TDSB's approved online donation portal or other centrally approved module. Fundraising may not be conducted using external fundraising websites and applications.

6.15. Eligible and Ineligible Uses of Fundraising Proceeds

3-9-6.15.1. Funds raised for school purposes are to be used to complement, not replace public funding for education. In accordance with the Ministry of Education's School Fundraising Guideline, school generated funds are not to be used to provide resources necessary for the delivery of curriculum or a safe learning environment, i.e. structural repair, sanitation, emergency repair, textbooks required to deliver curriculum, school administration, staff positions covered under collective agreements.

Exception: Funds raised or donations received for special purpose areas of a school (see policy P047, Naming Schools and Special Purpose Areas, section 4.7)

3.10. Resources generated through fundraising activities will be used within a two-year period unless designated for a specific project.

3-11-6.15.2. School councils shall be informed about how ground projects are an eligible use of fundraising proceeds are used by the school as, but prior central approval is required by O. Reg. 612/00, School Councils before departments and/or schools begin to fundraise for this purpose.

4.07. SPECIFIC DIRECTIVES

4.1. The Director of Education is authorized to issue operational procedures to implement this ~~policy~~Policy.

8. EVALUATION

This Policy will be reviewed as required, but at a minimum every five (5) years after the effective date.

9. APPENDICES

- N/A

5.010. REFERENCE DOCUMENTS

~~Operational Procedure PR508, Legislation~~

- Education Act
- Ontario Regulation 612/00

Policies

- Advertising and Distribution of Materials (P006)
- Board Member Code of Conduct (P075)
- Employee Conflict of Interest (P057)
- Human Rights (P031)
- Mission, Values and Goals (P002)
- Purchasing (P017)
- Restrictions on Alcohol, Drug and Tobacco Use (P095)

Procedures

- Board Code of Conduct (PR585)
- Fundraising (PR508)

~~Board Policy P002, Mission and Values~~

~~Board Policy P047, Naming Schools and Special Purpose Areas~~

- O. Reg. 612/00, International Disaster Relief (PR609)
- Promoting Respect in the Workplace (PR739)

Other Documents

- Ministry of Education's School Councils Fundraising Guideline
- ~~R.R.O. 1990, Reg. 298, Operation of Schools—General~~

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2. OBJECTIVE

- To outline expectations and provide directions to TDSB staff and members of school communities when planning and implementing fundraising activities.

3. DEFINITIONS

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External Organizations are groups that are not legally affiliated with the Board. They may fundraise for their own purposes, or for TDSB (schools, departments, central initiatives). Examples of these groups are alumni associations, corporations or Home & School Associations.

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students, staff and the school community to raise funds in support of:

- local school programs/initiatives;
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System Priorities Fund means a central fund established by the Board for the purpose of managing undesignated donations or donations designated for the fund. This fund assists in addressing system needs across all schools and/or helps distribute resources based on equitable principles.

4. RESPONSIBILITY

Associate Director, Modernization and Strategic Resource Alignment

5. APPLICATION AND SCOPE

This Policy applies to all employees, members of school councils and community members involved in planning, implementing and supervising fundraising activities and managing donations to the Board.

6. POLICY

6.1. Accountability of Funds

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- 6.1.2. Central staff will have financial oversight of all system-wide fundraising activities and donations.

6.2. System Priorities Fund

- 6.2.1. To facilitate improved equity of resources among schools, a System Priorities Fund will be maintained to redirect undesignated donations from external sources and/or for schools to voluntarily direct surplus School Generated Funds.
- 6.2.2. A process for the allocation of System Priorities Funds will be determined by the accompanying Fundraising Procedure (PR508).

6.3. Conflict of Interest

- 6.3.1. All employees, school community members, and Trustees must avoid situations which may result in an actual or apparent conflict of interest and comply with all applicable TDSB policies, including the Employee Conflict of Interest Policy (P057), the Board Member Code of Conduct (P075) and Purchasing Policy (P017).

6.4. Funds Management

- 6.4.1. Fundraising activities must be accountable and transparent, with school/student councils and their local school communities being informed about how fundraising proceeds are used by the school.
- 6.4.2. Funds must be raised for a designated purpose and used for that intended purpose. School generated funds will be used within a two-year period unless specified for a specific project or use.
- 6.4.3. The fundraising plan will be documented in a school generated funds plan and incorporate input from the School Council.

- 6.4.4. All financial activities regarding school generated funds must be tracked and reported to the Board for year-end financial reporting purposes. If the designated purpose is no longer applicable or if there are unused surplus funds remaining from historic fundraising activities, the funds can be redirected to other purposes by the school principal in consultation with the school community.

6.5. Promotional Materials for Fundraising Activities

- 6.5.1. All promotional materials related to fundraising and/or sponsorship activities require approval by the principal prior to distribution to the community and must comply with the Board's Advertising and Distribution of Materials Policy (P006), and other relevant policies and procedures (e.g., Human Rights (P031), Board Code of Conduct (PR585), Promoting Respect in the Workplace (PR739).

6.6. Fundraising to Support External Organizations and/or Other Causes

- 6.6.1. Fundraising to support External Organizations and/or Other Causes will require approval of the school principal or central department lead. Where possible, contributions to an external organization or cause should be collected directly by the external organization. Upon receipt, responsibility for the funds will rest solely with the external organization.
- 6.6.2. The Board will not provide tax receipts for these funds; this will be the sole responsibility of the External Organization.
- 6.6.3. No External Organization will fundraise in the name of the school, operate as a school council of the school, or conduct fundraising or other activities in a school, or use the school's name, without the principal and the Board's consent and approval.
- 6.6.4. Any External Organization affiliated with schools will conform to Board and Ministry of Education policies and applicable legislation, including Ontario Regulation 612/00.
- 6.6.5. Central fundraising activities, including Board-initiated campaigns, including international disaster relief efforts will be managed by central staff and in accordance with the International Disaster Relief Procedure (PR609).

6.7. Participation and Consent

- 6.7.1. Participation in fundraising activities is strictly voluntary. No individual should feel compelled to participate in any fundraising activity supporting internal or external initiatives, nor should they be subject to penalties, or denied any benefits, if they choose not to participate.

6.8. Safety Considerations

- 6.8.1. Safety of students is a primary consideration in all fundraising activities. Parents/Guardians/Caregivers must be informed of all fundraising activities before they are undertaken by students. Student fundraising activities require supervision and should be age appropriate.

6.9. Procurement Requirements surrounding Fundraising Activities

- 6.9.1. Schools must use Board approved Fundraising/Fun Fair Vendors to ensure the company is in good standing. Products used for school fundraising will be of good quality and provided by reputable companies as defined by the Board's purchasing guidelines to reflect the school community's standard of propriety and the Board's Mission, Values and Goals Policy (P002). New fundraising vendors are added throughout the school year to a directory on the Board's website, granted they are in full compliance with the Board's policies and procedures.

6.10. Raffles and Lotteries

- 6.10.1. Schools planning to fundraise using a 'game of chance' (i.e., raffles, bingo, 50-50 draw, break open tickets) must apply for a Lottery License. All such activities are governed by the Gaming Control Act and all of its Regulations. A separate bank account must be opened, and the School Generated Funds bank account should not be used for games of chance.

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6.13. School Council Fundraising

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6.14. Online Fundraising and Crowdfunding

6.14.1. Fundraising may be conducted online, using only the TDSB's approved online donation portal or other centrally approved module. Fundraising may not be conducted using external fundraising websites and applications.

6.15. Eligible and Ineligible Uses of Fundraising Proceeds

6.15.1. Funds raised for school purposes are to be used to complement, not replace public funding for education. In accordance with the Ministry of Education's School Fundraising Guideline, school generated funds are not to be used to provide resources necessary for the delivery of curriculum or a safe learning environment.

6.15.2. School ground projects are an eligible use of fundraising proceeds, but prior central approval is required before departments and/or schools begin to fundraise for this purpose.

7. SPECIFIC DIRECTIVES

The Director of Education is authorized to issue operational procedures to implement this Policy.

8. EVALUATION

This Policy will be reviewed as required, but at a minimum every five (5) years after the effective date.

9. APPENDICES

- N/A

10. REFERENCE DOCUMENTS

Legislation

- *Education Act*
- Ontario Regulation 612/00

Policies

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- Board Member Code of Conduct (P075)
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Other Documents

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